



EAM Program
401 Oak Street, Suite #404
Roseville, California 95678

Request for Proposal (RFP)

Enterprise Asset Management (EAM) System

Integrator

Copies of this RFP are available at www.roseville.ca.us/eam. Proposers are encouraged to register by sending an email to msinor@roseville.ca.us to ensure receipt of any and all subsequent communications. All communications related to this RFP will be posted to www.roseville.ca.us/eam and registered Proposers will be notified of all postings.

Date Issued: Monday, December 8, 2008
Date Due: Friday, January 23rd, 2009
Time Due: 3:00 pm Pacific Standard Time (PST)

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ATTACHMENT A: PROFESSIONAL SERVICES AGREEMENT

ATTACHMENT B: EAM SYSTEM SOFTWARE PROPOSAL

ATTACHMENT C: BUSINESS PROCESS ANALYSIS

ATTACHMENT D: SYSTEM REQUIREMENTS SPECIFICATION

ATTACHMENT E: EAM PROGRAM PLANNING FEASIBILITY STUDY REPORT

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ATTACHMENT I: SYSTEM INTEGRATION REQUIREMENTS

1 INTRODUCTION TO SOLICITATION

1.1 Overview of City

The City of Roseville (City) is a community 17 miles northeast of Sacramento with a resident population of approximately 108,000. The City is full-service with 17 departments and approximately 140 divisions. The City services include public safety (police and fire), electric power transmission and distribution, electric power generation, environmental utilities (solid waste, storm water, water, recycled water and wastewater), parks and recreation, public works, community development, housing, libraries, and general administrative and support services. The City has a projected budget of approximately \$500 million in fiscal year 2009.

References to “City of Roseville” and “City” shall be used interchangeably in this RFP.

1.2 Background

The City has diverse needs in its information technology environment supporting asset management in seven departments offering a strong variety of services. Together these departments comprise 12 major asset groups listed below.

Building Maintenance	Public Works (Streets & Traffic Signals)
Electric Transmission & Distribution	Solid Waste
Electric Power Generation	Wastewater Collection
Fleet	Wastewater Treatment
Information Technology	Water Distribution
Parks	Water Treatment

Currently, numerous Computerized Maintenance Management Systems (CMMS) are in use including Hansen, MP2, Cascade, Landlogic, Squarerigger and several ad-hoc Microsoft Access databases and Excel spreadsheets. These systems are difficult and expensive to maintain, are not well integrated with other City business systems for communicating and sharing information and have very little advanced asset management capabilities. Due to these limitations, the City lacks the formal, standardized business processes necessary to optimize the performance and reliability of assets across the City.

The City began a project in 2006 to evaluate its existing asset management processes and related systems. The City also evaluated the organizational readiness of the individual departments to implement a major citywide business process change. The first outcome of the study was identification of specific business drivers that define the environment and constraints under which the City operates. The business drivers are

listed below and discussed in Attachment E:

- Growth
- Customer Service
- Cost Competitiveness/Cost of Service
- Regulatory Compliance
- Workforce (Lost Knowledge, Hiring, Development, Training, Education)
- Infrastructure Reliability (Build New, Rehabilitate, Replace)
- Risk Management

With the identification of these business drivers the City developed specific high level Business Processes that would address each driver. The Business Processes were identified during a gap analysis evaluation of the City's current and desired operations. These five Business Processes are discussed in Attachment C and include:

- Monitor and Manage Business Performance
- Respond to Unplanned Asset Events
- Plan and Schedule Non-Urgent Asset Work
- Assign and Perform Planned Asset Work
- Asset Maintenance & Renewal Optimization

The City desires a central system (an EAM System Solution) and an asset management program that will facilitate the implementation of these business processes. The solution will also allow the City to save time and money by reducing the resources required to support and maintain multiple systems as well as increasing efficiencies related to procuring, installing, maintaining, and decommissioning assets.

The evaluation was documented in a Business Process Technical Memorandum, a System Requirements Technical Memorandum and a Feasibility Report. These documents are included in Appendices C, D, and E. They serve as the foundation and criteria for selecting a new Enterprise Asset Management (EAM) system and implementing the "to-be" business processes. The program has been developed to implement over a 5 year period in 5 annual phases. The phasing schedule is shown below.

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
2009	2010	2011	2012	2013
Water Treatment Plant	Water Distribution	Electric Substations	Electric Transmission & Distribution (Horizontal)	Electric Power Generation
WW Treatment Plants	Wastewater Collection	Information Technology		Parks and Recreation
Street Maintenance	Building Facilities			Fleet
Traffic Signals	Solid Waste			

1.3 Project Intent

The City of Roseville is seeking proposals from qualified implementation and integration services companies (herein after referred to as “Integrator”). The selected Integrator will provide services for the successful implementation of an EAM System Solution, integration of the EAM System with existing City business systems, and implementation of standardized business processes to optimize management of the City’s assets and eliminate system redundancy.

The City desires to manage a single agreement to provide both the EAM System software and integration services. Therefore, the City has separated the procurement of an EAM System Solution in two parts. The first (Part 1) was the solicitation and selection of EAM System software. The second (Part 2) is the solicitation and selection of a consultant team who will provide services to implement the EAM system solution, integrate this solution with existing City business system, and implement the identified business processes.

The City is currently in the process of negotiating an agreement with IBM for the acquisition of the Maximo software solution, Version 7, and related installation services. The agreement will provide terms and conditions, including scope of product, scope of services, fee, and working relationships. The City will assign this agreement to the Integrator to provide the implementation and integration services for the City. The Integrator will operate as the Prime contractor, and IBM will operate as a sub-agreement System Solution Provider through the Integrator. The selected Integrator must agree to accept assignment of the agreement with IBM. The products and services defined in the agreement with IBM, including licensing, installation, training of City staff, troubleshooting, and the first year of maintenance will be provided by the Integrator through this contract assignment. The Integrator will act on behalf of the City, under direction from City management staff. The draft agreement with IBM is included in Attachment F for reference.

The requirements defined in this RFP are intended to provide the City with an EAM system that is integrated with the City’s key business systems and configured to support the City’s asset management business processes. Through assignment of the contract with IBM Maximo, the requirements will also include the following:

- o Software licensing
- o Software maintenance (first year)
- o Installation of system software
- o Software documentation
- o Software training

The City intends to use the standard functionality of IBM Maximo to define best business practices to the greatest possible extent. Accordingly, the City intends to replace all existing asset and work management systems, including Computerized Maintenance Management Systems, spreadsheets, and Microsoft Access databases, with IBM Maximo. The City intends to implement a system that is essentially off-the-shelf. Maximo modules and features will be implemented for the most part with

standard and configured functionality.

2 INSTRUCTIONS TO PROPOSERS

2.1 Invitation to Propose

The City is requesting proposals for implementation and integration services for an Enterprise Asset Management (EAM) System Solution. The City will only consider proposals from implementation and integration services companies that have successfully implemented and integrated the IBM Maximo software solution for municipal utilities and/or state and local government agencies.

All responses received within the specified time period that comply with the terms set forth in this RFP will be considered by the City. Subsequently, each response will be evaluated against conformance to requirements and ranked based on established evaluation and selection criteria. Proposals must be in compliance with this RFP. Failure to comply with all provisions of the RFP may result in disqualification at the sole discretion of the City.

The City will not be liable in any way for costs incurred by Proposers in the preparation of a response to this RFP, nor for the submittal or presentation of proposals, subsequent participation in interviews, demonstrations, discussions, or negotiations related to the response.

The City reserves the right to withdraw this RFP at any time, for any reason, and to issue such clarifications, modifications, and/or amendments as the City may deem necessary and appropriate.

Receipt of a proposal by the City or a submission of a proposal to the City confers no rights upon the Proposer nor obligates the City in any way.

The City reserves the right to waive minor irregularities in proposals, provided that such action is in the best interest of the City. Any such waiver shall not modify or waive any remaining RFP requirements or excuse the Proposer from full compliance with the RFP specifications and other requirements if the Proposer is selected for agreement award.

The City reserves the right to accept or reject in whole or in part any or all proposals submitted. The City may reject the proposal of any Proposer that is determined to be non-responsive.

2.2 Submission of Proposals

Each Proposer shall submit to the City one (1) reproducible original, sixteen (16) hard copies, and one (1) electronic copy (in Microsoft Office and/or PDF formats on a CD, DVD or USB drive). A one (1) page Cost Proposal incorporating **all** pricing cost structures and breakdowns is to be provided in a separately sealed and clearly marked envelope. All proposal documents, electronic media, and pricing information should be

submitted in a single sealed package.

All proposals must be received by the City no later than 3:00 PM Pacific Standard Time (PST) on the date stipulated in Section 5. Proposals received after this date and time will not be considered.

Proposal packages shall be clearly marked "EAM System Integrator Proposal" and delivered to:

City of Roseville
City Clerk Office
311 Vernon Street
Roseville, California 95678-2649

The proposal should be signed by a person, or persons, duly authorized to bind the vendor. The City is under no obligation to return proposals.

2.3 RFP Questions and Clarifications

Vendors shall aggregate their questions and requests for clarification and submit them via mail or e-mail to:

Michael Sinor
EAM Program Manager
City of Roseville
401 Oak Street, Suite 404
Roseville, California 95678
msinor@roseville.ca.us

Requests for clarification, questions, the City's responses, and all other communications will be posted to the City's website at www.roseville.ca.us/eam. Notifications of postings to this website will be emailed to all registered Proposers. Requests for clarification and questions must be received by the City no later than 5:00 pm Pacific Standard Time (PST) on the date stipulated in Section 5.

Proposers are encouraged to register by sending an email to msinor@roseville.ca.us to assure receipt of any and all subsequent communications. All communications related to this RFP will be posted to www.roseville.ca.us/eam.

Unauthorized contact by Proposers regarding the EAM project and/or this RFP with employees or officials of the City of Roseville, other than the contact listed above, may result in disqualification from this procurement process.

Only the City's official, written responses and communications shall be considered binding with regard to this RFP.

2.4 Period of Validity

All proposals submitted to the City must include a statement establishing a Period of Validity for one-hundred and eighty (180) calendar days subsequent to the RFP closing date.

Failure of the Proposer to include a statement of validity for its proposal that meets the period set forth by the City may result in rejection of proposal.

2.5 Proposal Instructions

Proposals must be submitted in standard 8.5" by 11" single-sided page format. Any materials that are larger than this size should be folded to fit into the 8.5" by 11" single-sided page format. Font size should not be smaller than 11 point in either Arial or Times format using standard margins. Proposals shall not exceed the page limits outlined in Section 4. All response materials in excess of the page limit will not be considered.

Additional supplemental materials provided by the Proposer, as instructed by the City or included to support the response, must be assembled in Appendix C as defined in Section 4. The City discourages the inclusion of general marketing materials unless they are used to provide specific, relevant information.

All proposals should be submitted by the Proposer and organized in the order shown in Section 4. The content of the proposal must be clearly labeled, with pages numbered, and separated by tabs. Failure by a Proposer to include all required content may result in disqualification of the proposal.

The City reserves the right to request additional information from Proposers during the proposal evaluation process.

3 SCOPE

3.1 Task 1 – Develop Project Management Plan

Develop a detailed project management plan for all implementation phases of the project and include the following components. The plan shall be updated to reflect any changes as the project progresses through the 5-year implementation.

- A. Project Charter
- B. Project Management Procedures
- C. Roles and Responsibilities (for all stakeholders, including City staff and the consultant team)
- D. Staffing Management Plan
- E. Change Management Plan (to ensure acceptance and successful implementation of the EAM program by all stakeholders)
- F. Communications Plan

- G. Risk Management Plan (to identify and mitigate project risks)
- H. System Installation Plan (for installing the EAM system in the City's data center)
- I. Business Process Development Plan (identify the proposed steps to develop detailed "to-be" Business Processes for each asset group)
- J. System Implementation Plan (identify the proposed steps to configure the EAM System, condition and transfer data from existing systems and integrate the EAM System with City business systems)
- K. System Testing Plan (a strategy and plan for extensive system testing)
- L. Schedules and Work Breakdown Structures (including task constraints, critical paths, and resource requirements)
- M. Training Plan (a training strategy and a plan for all training to be provided, including training for end users and IT staff)

Task 1 Deliverables

The following deliverables shall be provided for the overall project and each of the 5 phases. The documents shall be provided in a tabbed binder to include the plan and subsequent updates.

- Project Charter
- Staffing Management Plan
- Change Management Plan
- Communications Plan
- Risk Management Plan
- Business Process Development Plan
- System Implementation Plan
- System Testing Plan
- Training Plan

3.2 Task 2 – System Architecture Design & System Installation

- Identify major hardware and software sub-systems and components required for implementation, including EAM modules, middleware, operating systems, databases, City business systems, third party software systems and technical infrastructure.
- Develop hardware and software specifications for the EAM System and sub-systems.
- Identify and document any batch and/or online processing requirements.
- Install EAM System, sub-systems and modules, including but not limited to all Maximo core modules, as well as the additional modules listed in Table 3.1:

Table 3.1

A. Maximo Spatial	K. Maximo Mobile Work Manager
B. Maximo Linear	L. Maximo Mobile Inventory Manager
C. Tivoli Service Request Manager for IT	M. Maximo Adapter for MS Project
D. Tivoli Asset Manager for IT	N. Maximo Spatial Asset Management Server
E. Maximo Utilities	O. Maximo Enterprise Adapter
F. Maximo Fleet	

Task 2 Deliverables

- Technical memorandum defining the system architecture to be implemented, including architecture diagrams and process flow diagrams
- Technical memorandum documenting all installation procedures

3.3 Task 3 – Develop Detailed Asset Management Business Processes

Consultant shall develop the Business Processes identified in Attachment C for each asset group and as outlined in the Program Implementation Plan (Task 1). This task shall include the following:

- A. Perform detailed business process analyses for each asset group to realize the following goals:
 - o Standardize business processes across the enterprise
 - o Implement asset management best practices
 - o Implement advanced asset management principles
- B. Develop detailed business process models for each asset group.
- C. Develop key performance indicators (KPI) for each business process within each asset group.
- D. Develop workflow and data entry standards for each business process, including procurement and inventory management.

This task shall include workshops, brainstorming sessions, schedules, products and deliverables sufficient to develop detailed Business Processes that build on the high level “to-be” processes identified in Attachment C.

Task 3 Deliverables

- Technical Memorandum for each asset group that documents the detailed Business Processes (this technical memorandum shall include detailed descriptions of all process steps as well as detailed process models)

3.4 Task 4 – Configure and Customize EAM System Solution

The Integrator shall configure and customize the EAM System Solution for each asset group to optimize the business processes developed in Task 3. The City intends to use out-of-the-

box functionality and product configuration whenever possible to meet business requirements. However, some customization of the product may be necessary. The City's detailed requirements for the EAM System Solution are presented in Attachment D and IBM's responses to the requirements are included in Attachment B, the IBM proposal. The City desires to implement these system requirements to the extent feasible, and the Integrator shall identify the most cost effective means to achieve this. The Integrator shall be ultimately responsible for configuring and/or customizing Maximo to meet the City's requirements. This task includes but is not limited to the following subtasks:

- A. Establish organizational hierarchy
- B. Establish role-based security
- C. Develop asset hierarchies for each asset group, including location and equipment hierarchies
 - a. Review existing asset hierarchy for all assets types. Develop recommendations to modify the asset structure to align with industry best practices and to meet business requirements
 - b. Implement modifications to the asset hierarchy as approved by the City
- D. Configure EAM System Solution to utilize GIS as the system of record for horizontal assets (the City intends to implement a third party GIS tool and data model, such as ArcFM by Telvent Miner & Miner, to manage horizontal assets for Electric T&D, Water, and Wastewater)
- E. Configure and optimize system screens for each asset group
- F. Configure and optimize workflow for each asset group
- G. Identify system capacity needs for each implementation phase
- H. Identify system security issues for each implementation phase

Task 4 Deliverables

- Technical Memoranda for each phase documenting all system configurations, including fields renamed and hidden, forms and fields added, workflow setup, and conditions)
- Technical Memoranda for each phase documenting all customizations

3.5 Task 5 – Convert/Migrate Data from Legacy CMMS Systems into EAM System

- A. Evaluate the integrity (completeness and condition) of existing data for all asset groups. Data conversion/migration shall not occur if the data is incomplete or in poor condition such that the conversion/migration will fail or otherwise result in a non-functional system. Evaluate the data to identify gaps, errors, missing data, and any other anomalies that will result in the system failing to meet business requirements. Consultant shall report the integrity of the data and recommend improvements required prior to migration including the level of effort required by Consultant and City.
- B. Implement recommendations to condition the data prior to migration (Proposers shall describe and quantify all assumptions made in determining the magnitude of effort required. The description shall be sufficient to determine when the level of effort exceeds that included in the scope).

C. Convert/migrate data from existing CMMS systems, Microsoft Access database and Microsoft Excel spreadsheets into new EAM system.

Table 3.2 describes the existing data sources that the Integrator shall convert into the EAM system. Some systems will require a phased conversion and thus potential bridge interfaces between the legacy system and the EAM system will be required to maintain the correct business and data continuity.

Table 3.2

#	Legacy Data	Database	Purpose	Asset Groups	Phase
1	Hansen	Oracle	Horizontal assets, work orders, preventative maintenance, materials, inspections, and service requests	Water Distribution, Wastewater Collection, Streets	1-2
2	MP2	SQL Server	Vertical assets, work orders, preventative maintenance, materials, and work requests	Water Treatment Plant, Wastewater Treatment Plant	1
3	MP2	Ms Access	Vertical assets, work orders, preventative maintenance, and materials,	Electric Power Generation	5
4	Squarerigger	SQL Server	Vehicles, work orders, materials, preventative maintenance, and fueling	Fleet	5
5	Land Logic	CodeBase	Park assets, work orders, and inspections	Parks	5
6	Cascade	Sybase	Assets and preventative Maintenance	Electric Transmission & Distribution	3-4
7	~20 spreadsheets	Excel	Various excel spreadsheets containing assets, material, and maintenance history	Environmental Utilities, Traffic, Electric	1-5
8	~20 to25 separate databases	Microsoft Access	Various Microsoft Access databases containing assets, material, and maintenance history	Environmental Utilities, Electric	1-5

Task 5 – Deliverables

Technical Memoranda for each phase, describing all data cleansing work to be performed with the level of effort required by Consultant and City staff.

The following deliverables shall be provided for all migrations and conversions:

- Requirements documentation
- Functional and Technical Specifications
- Conversion Scripts
- Exception Logs
- QA/QC documentation (reports showing comparison of record counts before and after)

3.6 Task 6 – Integrate EAM System with City Business Systems

Design and develop interfaces between the EAM System and the City Business Systems described in Table 3.3. The integrator shall use the Maximo Enterprise Adapter or provide another middleware tool to perform this integration. The cost of any proposed middleware software other than the Maximo Enterprise Adapter (included in the contract with IBM), shall be included in the cost proposal. The high-level requirements for each integration point are listed in Attachment I.

Table 3.3

System Name	Software	System Description
CIS	Indus Banner	Customer Information Management is used to manage customer accounts, billing and revenue (accounts receivable)
CRM	Civica Software	Customer Relationship Management is used to manage customer interactions and provide requested information
GIS	ESRI (ArcGIS 9.x, ArcSDE 9.x, ArcServer 9.x, ArcIMS 9.x)	Geographic Information System is used to manage the spatial location, connectivity and attribution of the City's distributed assets, in addition to land features such as parcels, streets, servitudes, easements. The City intends to implement a third party tool and data model, such as ArcFM by Telvent Miner & Miner, to manage horizontal assets for Electric T&D, Water, and Wastewater
IFAS	Sungard Bi-Tech IFAS	The City's General Ledger, Procurement, Accounts Payable, HR and current Materials Management System
TAR	Workforce Software	Time and Attendance Reporting system used to manage employees' normal time and overtime and pass the approved information to the payroll system
EDMS	Sire Technologies	Electronic Document Mgmt System

System Name	Software	System Description
Condition Assessment Systems	Flexidata (Wastewater Collection), Doble (Electric T&D), Oil Analysis (Electric T&D), Pavement Condition Assessment (Streets)	Systems used to assess and capture the condition of the assets, including Wastewater Collection Assessment, Electric Transmission & Distribution and Pavement Condition Assessment
SCADA	Transdyn (Environmental Utilities), Emerson (Electric Power Generation)	Supervisor Control and Data Acquisition (SCADA) systems used to monitor and control the operation of the water, wastewater and electric generating plants as well as important components of the transmission and distribution systems
SCADA Historian	OSIsoft PI Historian (Electric Power Generation)	Supervisor Control and Data Acquisition (SCADA) with the PI Historian product from OSIsoft that manages the large volumes of time-related SCADA data
SCADA Historian	HDR	Supervisor Control and Data Acquisition (SCADA) used to manage the operation of the Water and Wastewater Treatment Plants and important Pump Stations with the in-house City-developed Historical Data Repository (HDR) that manages the large volumes of time related SCADA data
FMS	FMS	Fuel Management System used to provide information on fuel supplied to the City's vehicles
Email	Microsoft Exchange 2003/ Outlook 2003	The City's email system
Directory Services	Microsoft Windows Server 2003 Active Directory	The IT system that manages user accounts and passwords (authentication for security access control)
LIMS	LIMS	Laboratory Information Management System used to manage the water quality samples and readings

System Name	Software	System Description
CAD	Autodesk AutoCAD Map 2008	Computer Aided Drafting system used for managing detailed design drawings
GWD	Autodesk Utility Design (AUD)	Graphic Work Design used to design changes to the electric distribution system and define the bill of materials and labor cost estimate
Project Scheduling	Microsoft Project 2003	Project Scheduling system used to manage the interdependencies of tasks that make up a project

Task 6 Deliverables

The following deliverables shall be provided for all interfaces:

- Requirements documentation
- Functional and technical specifications
- Documented instructions for implementation and maintenance
- Integration scripts
- Knowledge transfer

3.7 Task 7 – Develop and Implement Maintenance Plans

For each asset group, identify maintenance objectives and develop comprehensive maintenance plans that support these objectives. Implement these maintenance plans in the EAM System for each asset group.

Consultant shall develop this task, including a description of planned activities for each asset group. The level of effort and cost estimate for this task shall be prepared and submitted by subtask for each asset group in the separate cost proposal.

The Environmental Utilities (EU) Department performed pilot studies with GE Energy Reliability Services at its two wastewater treatment plants in a first phase effort to develop an Asset Reliability Program for vertical assets. EU intends to complete the program by extending this pilot phase to include the remaining assets at the wastewater treatment plants as well as at the water treatment plant, wells, pumping and lift stations, etc. throughout the utility. A summary description of the work completed to date and work required to complete the program is included in Attachment G along with summary technical memoranda related to the pilot work. The work to be performed in Task 5 for EU vertical assets (only) shall result in the completion of the Asset Reliability Program for EU vertical assets. Refer to Attachment G for the details to satisfy this task for EU.

Task 7 Deliverables

- Technical memoranda for each asset group documenting maintenance objectives and plans

3.8 Task 8 – System Solution Testing

Perform the following for each asset group in all 5 phases:

- Test, verify, and validate the system in a controlled test environment.
- Verify that all software and hardware is functioning properly throughout the enterprise.
- Perform user acceptance testing to validate the functional use of the system, business processes and data, including the business rules, software configuration, data conversions and interfaces.
- Develop test plans and scripts based on the “to-be” business processes
- Test each process scenario and step in detail
- Perform load testing and performance tuning before go-live

Task 8 Deliverables

- Test plans and scripts based on the “to-be” business processes

3.9 Task 9 – Change Management

Implement the change management plan developed in Task 1 to ensure successful implementation of the EAM program and acceptance by all stakeholders, including end users, Steering Committee, managers, business leaders and program implementation staff. Consultant will work with the City to identify the appropriate staff or position types.

3.10 Task 10 – Provide Training and Knowledge Transfer

Provide training as developed in Task 1 for all asset groups and all 5 phases of the project. At a minimum training shall include user based training on the use of the EAM system, on-site support after installation, as well as training to support the new business processes and methodologies.

Task 10 Deliverables

- End user training documentation by role for new business processes
- Technical training documentation for system administration and support, including
 - o System installation
 - o System administration
 - o Role-based security
 - o System configuration
 - o Middleware support

3.11 Task 11 – Project Management

Provide project management sufficient to complete all tasks on schedule and budget including the assignment of the vendor contract to procure the software products and the scope attached to those products. Provide a detailed discussion of the planned project management elements proposed to complete this very diverse project including management of the IBM Maximo procurement. Include methodologies, techniques, tools, deliverables, meetings, and expectations of City staff.

Task 11 Deliverables

- Issue tracking logs to help mitigate risks and problems
- Regular project status reports
- Project change control documentation

4 PROPOSAL CONTENT

Proposals are to follow the outline described below and must address all requested information. Any additional information that a proposing firm wishes to include that is not specifically requested should be included in an Appendix C to the proposal. Firms are encouraged to keep the proposals brief and to the point, but sufficiently detailed to allow evaluation of the project approach.

4.1 Cover Letter

Page requirements: Not to exceed 2 pages

Submit a Cover Letter on company letterhead closing with the signature of a company official who is authorized to bind on the Proposer's organization. The authorized official must certify that all information in the proposal is true, accurate, and complete. Provide a named contact including telephone number, fax, and email address for all communication regarding this RFP. The letter must also include a Statement of Validity, as defined in Section 2.4. In addition, the letter must indicate that the Proposer's company agrees to be bound by the proposal without modification. If the proposal represents offerings to be made by different firms or organizations, the City will do business only with the Proposer and will require the Proposer's organization to assume responsibility for the total project. Do not include any pricing in the Cover Letter.

4.2 Chapter 1 – Project Overview

Page requirements: Not to exceed 5 pages

Provide a narrative description of the project based on the Scope (Section 3) presented in the RFP. Include any issues that you believe will require special consideration for this project. Also identify any unique approaches or strengths that your firm may have related to this project. City staff will assess your understanding of the project based on the overview.

4.3 Chapter 2 – Project Team, Experience, and Company Background

Page requirements: Not to exceed 8 pages

Provide a description of your firm and proposed project personnel, including all sub-consultants. Include a project team organizational diagram and description identifying each member's role plus a brief resume of each team member. The geographic location of the project office and key personnel shall also be identified. Full resumes may be included in Appendix A.

Provide a description of your firm's experience implementing projects similar in nature and scope to this project. Include only those projects where there was significant involvement from individuals who are part of the proposed project team. For both the proposed Project Manager and the proposed Technical Lead, include at least 2 projects depicting experience specifically implementing IBM Maximo. Also, include experience integrating IBM Maximo with other business systems using the Maximo Enterprise Adapter or other middleware applications. Include the following information for each project:

- Client information
 - Client name
 - Type of business
 - Business address
- Client Project Manager
 - Name and title
 - Telephone number
 - Email address
- Consultant Project Manager
 - Name and title
 - Company name
- Consultant Technical Lead
 - Name and title
 - Company name
- Other consultant role
 - Name and title
 - Company name
 - Project role
- Project title
- Project duration
- Project scope
- Summary of services provided, including:
- Date of project execution

4.4 Chapter 3 – Detailed Work Plan

Page requirements: Not to exceed 12 pages

The proposal shall provide a description of the required tasks and duties for preparation of all project submittals and administration. The description shall include details to implement all tasks described in the Scope (Section 3) and any recommended additions or changes to the list of tasks. List anticipated deliverables and assumptions used in development of the work tasks as well as assistance expected from City staff. Also identify any unique approaches or strengths that your firm may have related to this project.

Describe and quantify all assumptions made in determining the magnitude of effort required. The description shall be sufficient to determine when the level of effort exceeds that included in the scope

4.5 Chapter 4 – Project Schedule

Page requirements: Not to exceed 2 pages

The proposal shall provide a project schedule showing key project milestones and deliverables. The schedule shall demonstrate your firm's ability to meet the phases defined in Table 4.1. Include a statement of the availability of the Project Manager and Technical Lead assigned to the project committing their resources for the duration of the project. Assumptions used in developing the schedule shall be identified.

Table 4.1

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
2009	2010	2011	2012	2013
Water Treatment Plant	Water Distribution	Electric Substations	Electric Transmission & Distribution (Horizontal)	Electric Power Generation
WW Treatment Plants	Wastewater Collection	Information Technology		Parks and Recreation
Street Maintenance	Building Facilities			Fleet
Traffic Signals	Solid Waste			

4.6 Chapter 5 – Conflicts of interest

Page requirements: Not to exceed 1 page

Firms submitting a Proposal in response to this RFP must disclose any actual, apparent, direct or indirect, or potential conflicts of interest that may exist with respect to the firm, management, or employees of the firm or other persons relative to the services to be provided under the Agreement for engineering services to be awarded pursuant to this RFP. If a firm has no conflicts of interests, a statement to that effect shall be included in the proposal.

4.7 Chapter 6 – Proprietary Information

Page requirements: Not to exceed 1 page

Firms submitting a Proposal in a response to this RFP must provide a statement that nothing contained in the submitted proposal will be proprietary. All proposals shall become the property of the City once submitted.

4.8 Chapter 7 – Insurance

Page requirements: Not to exceed 1 page

Provide proof of insurance coverage, including coverage for all sub-consultants. Minimum limits and types of insurance that are required to be maintained throughout the term of the project are identified in Section 6.

4.9 Appendices

Appendix A: Resumes

Attach resumes for all key team members.

Appendix B: Sample Documents

Provide the following documents, representing examples of your firm's work products:

- Business process analysis, including a process model (flowchart)
- Requirements document for a data conversion, a configuration, a customization, and an interface
- Training documentation
- User acceptance testing documentation
- Go-live checklist
- Statement of work

Appendix C: Comments related to the City's Professional Services Agreement Form
Proposers must review the Agreement Form included in Attachment A and either prepare a comment stipulating that the Agreement Form is acceptable or include an itemized list of comments that outline any exceptions requested for their firm to execute the Agreement with the City.

Appendix D: Supplemental Materials

Supplemental materials not specifically requested in the RFP may be included in Appendix D.

5 REQUEST FOR PROPOSAL (RFP) KEY INFORMATION

5.1 Schedule of Events

The schedule in Table 5.1 should be used as a working guide for planning purposes. The City reserves the right to adjust the schedule as required during the course of the RFP process.

Table 5.1 – Schedule of Events

December 8, 2008	RFP released
December 18, 2008	Mandatory Pre-Proposal Conference
January 16, 2009	RFP question and answer period ends
January 23, 2009	Proposals due
February 3, 2009	Shortlist determined
February 17 and 18, 2009	Integrator presentations to City
February 19, 2009	Preferred Integrator determined by City Selection Committee
February 23, 2009	Agreement negotiations begin
April 1, 2009	Agreement approved by City Council

5.2 Treatment of Information

Responses to this RFP become the exclusive property of the City of Roseville. The confidentiality of proposals will be protected by the City to the extent permitted by law. Proposals will not be publicly read.

5.3 Pre-Proposal Conference

A pre-proposal conference will be held beginning at 1:30 p.m. on the date shown in Section 5.1 at:

City of Roseville Corporation Yard
2005 Hilltop Circle
Roseville, California

The pre-proposal conference is for firms wishing to submit a proposal. Attendance will be noted and proposals will not be accepted if a representative of the firm or team is not in attendance. The meeting will include a brief presentation by City project staff on the details of the work to date and the goals of the project after which, the conference attendees will have an opportunity to ask questions.

5.4 Proposal Evaluation and Selection

The proposals will be screened by a selection committee and evaluated based on:

- o Experience and qualifications of the team
- o Ability to implement the business processes identified in the Feasibility Study (Attachment C).
- o Experience implementing IBM Maximo and integrating IBM Maximo with the business systems of state and local government agencies and/or municipal utilities
- o Ability to complete the work on time
- o Ability to deliver (the size of the company, years of experience, number of successful implementations, capabilities of project resources, delivery track record, and financial strength)
- o Completeness of the proposal
- o Work plan and understanding of the project
- o Responsiveness to the RFP
- o Level of effort relative to services provided
- o References
- o Experience developing Reliability Centered Maintenance programs for municipal utilities
- o Cost

The highest rated firms may be invited for interviews. The City will notify firms if they are selected for further consideration and schedule an interview time. The proposed project manager and project technical lead must be present at the interview; others may attend at the discretion of the firm.

5.5 Negotiations

The City will engage in best and final offer discussions as part of negotiations with the highest ranked Proposer. The fixed cost proposal submitted in response to this RFP should reflect the Proposer's comprehension and understanding of the stated requirements and compensation necessary to satisfactorily complete negotiations.

The City will enter into negotiations with the highest ranked Integrator. If negotiations with this Integrator fail, the City may negotiate with the second highest ranked Integrator. The final selection will be based on the satisfactory outcome of these negotiations.

6 GENERAL PROVISIONS

6.1 Proof of Insurance

Successful Proposer shall obtain and maintain during the term of this agreement insurance in the types and amounts as defined in Table 6.1. The successful Proposer shall provide, at its own expense and maintain at all times, the following insurance with insurance companies licensed in the State of California:

Table 6.1 – Insurance Coverage Requirements

Coverage	Limits of Liability
General Liability with the following endorsements: • Comprehensive • Premises – operations • Explosion/Collapse and Underground Hazard • Contractual • Products/Completed Operations • Broad Form Property Damage • Independent Contractors • Personal Injury	Bodily Injury: • \$1,000,000 each occurrence • \$2,000,000 aggregate Property Damage: • \$1,000,000 each occurrence Personal Injury: • \$1,000,000 each occurrence • \$2,000,000 aggregate
Automobile Liability with: • Comprehensive • Owned • Hired • Non-owned	Bodily Injury: • \$300,000 per person • \$500,000 per accident Property Damage • \$100,000 each occurrence
Workers' Compensation	Statutory
Professional Liability (Errors and Omissions)	\$1,000,000 each occurrence

The successful Proposer shall submit a certificate evidencing such coverage in a form satisfactory to the City Attorney prior to submitting an agreement to Council for approval. A separate endorsement form showing the City, its officers, agents and employees as additional insured, except for Workers Compensation and Professional Liability, shall also be provided. The coverage shall be primary as to such additional insured. Said certificate shall provide at least thirty (30) days written notice to the City prior to cancellation or modification of any insurance required for this project. Any insurance written on a claims-made basis is subject to approval of the City Attorney. Insurance coverage in the minimum amounts set forth shall not be construed to relieve the successful Proposer of liability in excess of such coverage, nor shall it preclude the City from taking such other actions as are available to it under any other provisions of the law.

Standard Hold Harmless Agreement - The vendor shall defend, indemnify and save and hold harmless the City, its officers, agents and employees from any claims, suits or actions of every name, kind and description brought forth, or on account of, injuries to or death of any persons, including, but not limited to, workers and the public, or damage to property, resulting from or arising out of the vendor's negligence or willful misconduct in the performance on this project.

6.2 Conflict of Interest

Each Proposer must disclose in the designated location in the proposal any actual, apparent, direct or indirect, or potential conflicts of interest that may exist with respect to the firm, management, or employees of the firm or other persons relative to the services to be provided under the Agreement for services to be awarded pursuant to this RFP. If a firm has no conflicts of interests, a statement to that effect shall be included in the proposal.

All Proposers must be able to legally conduct business in the State of California and with the City. The City will only conduct business with Proposers who do not have a conflict of interest. It is the responsibility of the Proposer during all phases of the RFP process to notify the City in writing of any potential conflict of interest.

The Proposer shall not collude in any manner or engage in any practices with any other Proposer(s), other business or IBM (who will provide the EAM software solution), which may restrict or eliminate competition or otherwise restrain trade. Violation of this instruction may cause the City to reject the Proposer's submittal. This prohibition is not intended to preclude joint ventures or sub-agreement relationships.

6.3 Completion of Proposal

Proposals shall be completed in accordance with the requirements of this RFP. Statements made by a Proposer shall also be without ambiguity, and with adequate elaboration, where necessary, for clear understanding.

6.4 Issuance of Clarifications and Addenda

If the City, in its sole discretion, determines that a clarification is required, such clarification shall be issued in writing. Interpretations, corrections or changes to the RFP made in any manner other than in writing are not binding upon the City and shall not be relied upon by Proposers.

Oral explanations or instructions given by the City during the proposal phase are not binding. Proposers shall seek all clarifications in writing.

Any interpretations, corrections or changes to this RFP will be made by written addendum. Sole issuing authority of addendum shall be vested in the City.

Proposers shall acknowledge receipt of all addenda within their proposal.

6.5 Withdrawal of Proposal

An authorized representative of the Proposer may withdraw its proposal at any time prior to the proposal submission deadline, upon presentation of acceptable identification as a representative of such Proposer.

6.6 Right to Negotiate

The City reserves the right to negotiate all elements that comprise the successful Proposer's proposal to ensure that the best possible consideration be afforded to all concerned.

7 COST PROPOSAL

In a sealed envelope, as a separate document to your Proposal, provide one copy of the cost estimate required for each task and sub - task identified in the Work Plan. At a minimum, include a line item cost estimate for each task outlined in the Scope of Work above. The spreadsheet shall be in a format that will permit City staff to determine the key project team member(s) proposed for each task and subtask and the number of management, engineering, technical, clerical and support personnel hours, cost per hour for each project team member and total cost envisioned for each task. The hourly rate, name of the team member and staff classification shall be included in the column headings of the spreadsheet. Minority team members such as clerical may be classified as such. Grouping of professional/technical staff into categories such as Staff Engineer, etc., shall not be allowed.

The cost proposal shall also be provided digitally, on a CD, DVD or USB storage device containing the spreadsheet file and cost proposal document in Microsoft Office format.

Identify all other costs to be billed to the project including project expenses (no mark-ups on expenses will be allowed) and sub-consultant costs. Include any proposed mark-up for sub-consultant fees. Include a copy of the proposed rate schedule(s) to be used throughout the duration of the project including any adjustments that are predicted to occur during the life of the project.